

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

1 Jesse Felix Castro (CONS/PE)

Attorney: Holley H. Perez

Case No. 06CEPR01119

Probate Status Hearing RE: Proof of Funds in a Blocked Account

	NEEDS/PROBLEMS/COMMENTS:
	OFF CALENDAR
	OFF CALENDAR. Receipts filed on 6/16/16.
	011 0/ 10/ 10.
Cont. from	
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: KT
Status Rpt	Reviewed on: 7/6/16
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 1- Castro

Attorney

LeVan, Nancy J. (for Conservators)

Status RE: Filing of the Annual or Biennial Account.

		CLAUDIA KENNISON and RHONDA	NEEDS/PROBLEMS/COMMENTS:
		KENNISON, daughter and	
		granddaughter, are Co-Conservators	Continued from 6/29/16
		with bond of \$61,038.63.	l
Co	nt. from 062916	The Co-Conservators' First Account	Need Second Account pursuant to Probate Code §2620 or written
	Aff.Sub.Wit.	covering the period of 1/13/09	status report pursuant to Local Rule
	Verified	through 12/31/09 was settled 7/13/10.	7.5.
	Inventory	=	
	PTC	On 5/12/16, the Court set this status	
	Not.Cred.	hearing re filing of the next account	
	Notice of	and sent notice to the attorney and	
	Hrg	both co-conservators.	
	Aff.Mail	=	
	Aff.Pub.	=	
	Sp.Ntc.	=	
	Pers.Serv.	=	
	Conf.	=	
	Screen		
	Letters	=	
	Duties/Supp	=	
	Objections	=	
	Video	╡	
	Receipt		
	CI Report	†	
	9202	╡	
	Order	╡	
	Aff. Posting	1	Reviewed by: skc
	Status Rpt	1	Reviewed on: 7/6/16
	UCCJEA	1	Updates:
	Citation	7	Recommendation:
	FTB Notice	7	File 2- Ihde

Rindlisbacher, Curtis D. (for Conservators)

Status RE: Termination of California Conservatorship proceedings

	BRIAN and ROSA LONG, parents, were	NEEDS/PROBLEMS/COMMENTS:
	appointed co-conservators on 4/5/10.	NEEDS/TROBLEMS/COMMENTS.
		Note: Page 6 is a related matter.
	On 6/1/16, the Court set this status hearing	
	re termination of California conservatorship	
	proceedings and sent notice to the	
Aff.Sub.Wit.	attorney, the co-conservators and the	
Verified	Conservatee.	
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 7/6/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 3- Long

Atty

Schacher, Kara, of Paso Robles (for Esperanza S. Booke, Administrator)
Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

	Statu	s He	earing Re: Filing of the First Account and/	
DOD: 6/15/2012			ESPERANZA S. BOOKE, sister, was	
			appointed Administrator with Full IAEA	
			authority without bond on 1/9/2013.	
	Cont. from: 030714,		Letters issued on 1/16/2013.	
	0414, 061215,	· - ,	Duranant to Brokata Code \$ 0000(b)	
	2315, 082615,		Pursuant to Probate Code § 8800(b), Final Inventory and Appraisal was due	
	0216, 040616		5/16/2013.	
	Aff.Sub.Wit.		0,10,2010.	
	Verified		Inventory and Appraisal filed on	
	Inventory	Х	8/22/2013 shows an estate value of	
	Account	Х	\$0.00 , indicating this is a no-asset	
	Not.Cred.		estate opened in order to allow the	
	Notice of		personal representative to proceed	
	Hrg		with a wrongful death claim on behalf of Decedent's heirs.	
	Aff.Mail		of Decedent stiens.	
	Aff.Pub.		Pursuant to Probate Code § 12200, first	
	Sp.Ntc.		account and/or petition for final	
	i 		distribution was due 1/16/2014.	
	Pers.Serv.			
	Conf.		Status Conference Statement filed	
-	Screen Letters		3/22/2016 states:The only asset of this estate is a	
			"pre-judgment interest" in the	
	Duties/Supp		wrongful death action in the	
	Objections		Eastern District Court of California,	
	Video		Case [number omitted];	
	Receipt		Recently the jury issued a verdict of	
	CI Report		not guilty/negligent in the death of	
	9202		Charles Salinas (copy of Verdict Form – First Phase dated 2/25/2016	
	Order		attached as Exhibit A);	
			ROBERT MAY, Attorney for	
			Esperanza Brook in the Eastern	
			District Court Case, has advised he	
			will be filing a motion for a new trial;	
	Aff. Posting		Petitioner is unable to file a final	
	Status Rpt		inventory and appraisal for the	
	UCCJEA		estate until a judgment is obtained in that action;	
	Citation		She requests the Court continue this	
	FTB Notice		matter for 12 months to allow for full	
			disposition of the matter.	

NEEDS/PROBLEMS/COMMENTS:

Continued from 4/6/2016. Minute
Order states Ms. Schacher was present in court, but left to appear in another courtroom. After court was completed she returned to this department, and the clerk advised Ms. Schacher of the next court date.

Note for background: Minute Order dated 3/2/2016 from a previous hearing states, in pertinent part, that Counsel states that her understanding is that the [SLO County] trial was lost, and that was the only asset in the estate; Counsel is attempting to find out the specific verdict.

- 1. Request for Dismissal filed 6/15/2016 indicates dismissal was not entered as requested as estate administration must be properly terminated via noticed hearing. Need verified petition requesting closure of the estate without administration, containing facts supporting such request, and proof of service of notice to the following persons pursuant to Probate Code §§1220(a)(1) and (a(2)(A) and 11000:
- Esperanza S. Booke, sister and Administrator;
- George Salinas, brother;
- Jennie Ruiz, sister;
- Lewis Salinas, brother;
- Ignacio Salinas, brother.

Reviewed by: LEG

Reviewed on: 7/6/16

Updates:

Recommendation:

File 4 – Salinas

Attorney: Heather H. Kruthers (for Petitioner/Conservator Public Guardian)

First Account Current and Report of Conservator and Petition for Allowance of compensation to Conservator and Attorney

		PUBLIC GUARDIAN, Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 12/10/14 - 5/9/16	
Co ✓	Aff.Sub.Wit. Verified Inventory	Accounting - \$65,482.45 Beginning POH - \$38,944.34 Ending POH - \$41,904.71 (\$2,960.37 is cash)	
<i>s</i>	Not.Cred. Notice of Hrg Aff.Mail	Conservator - \$5,627.12 (39.79 Deputy hours @ \$96/hr and 23.78 Staff hours @ \$76/hr)	Note: If the petition is granted, a status hearings will be set as follows:
	Aff.Pub. Sp.Ntc. Pers.Serv.	Attorney - \$2,500.00 (per Local Rule) Bond fee - \$37.50 (o.k.)	Wednesday, July 18, 2018 at 9:00 a.m. in Department 303, for the filing of the second account.
	Conf. Screen Letters Duties/Supp Objections	Petitioner prays for an Order: 1. Approving, allowing and settling	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar
	Video Receipt CI Report 9202	the first account; 2. Authorizing the conservator and attorney fees and commissions; 3. Payment of the bond fee.	and no appearance will be required.
√	Order Aff. Posting Status Rpt UCCJEA	= = -	Reviewed by: KT Reviewed on: 7/7/16 Updates:
	Citation FTB Notice		Recommendation: File 5- Greenberg

Status RE: Termination of California Conservatorship proceedings

	BRIAN and ROSA LONG, parents, were	NEEDS/PROBLEMS/COMMENTS:
	appointed co-conservators on 5/30/13.	
	On 6/1/16, the Court set this status hearing re termination of California conservatorship proceedings and sent	
Aff.Sub.Wit.	notice to the attorney, the co-	
Verified	conservators and the Conservatee.	
Inventory	1	
PTC	1	
Not.Cred.	1	
Notice of Hrg		
Aff.Mail	1	
Aff.Pub.	1	
Sp.Ntc.	1	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report]	
9202		
Order		
Aff. Posting	_	Reviewed by: skc
Status Rpt	4	Reviewed on: 7/6/16
UCCJEA	4	Updates:
Citation	4	Recommendation:
FTB Notice		File 6- Long

Atty

7

Docker, William F. (for Executor Carol Goulart)
Second Report of Status of Administration of Estate [Probate Code §12200]

DOD: 8/24/12		CAROL GOULART, Executor with Full IAEA	NEEDS/PROBLEMS/
		without bond, is Petitioner. Letters issued 7/9/13.	COMMENTS:
		I&A: \$1,850,310.00 consisting of various real	Minute Order 3/16/16:
		property interests.	Counsel requests 4 months.
	nt. from 042015,		·
091	615, 031616	Petition filed 3/4/15 states the estate is not yet	Need petition for final
	Aff.Sub.Wit.	in a position to close, but she has made	distribution pursuant to
~	Verified	significant progress toward that objective and	Probate Code §12200.
	Inventory	she believes she will complete the tasks which will allow her to file a Petition for distribution in	
	PTC	the near-term. The estate owns a 1/6 undivided	
	Not.Cred.	interest in real property in Santa Clara, and the	
~	Notice of	majority owners are negotiating a private sale	
	Hrg	of the property. Should the sale occur, the	
>	Aff.Mail W	estate would be in possession of ample funds	
	Aff.Pub.	to pay the FTB claim and administration	
	Sp.Ntc.	expenses to close the estate. If the property does not sell in the near-term, one of the co-	
	Pers.Serv.	owners is willing to advance funds to the estate	
	Conf.	for administrative expenses and debt and to	
	Screen	treat the funds as an advance against the	
~	Letters 7/9/13	estate's share of the sale proceeds. Keeping	
	Duties/Supp	the estate open in the near-term is not harmful	
	Objections	to the estate or beneficiaries and Petitioner expenses to have completed tax returns and	
	Video	collected funds to pay delinquent tax within	
	Receipt	the next 90 days. Petitioner prays for an order	
	CI Report	that the administration of the estate continue	
	9202	for a period of three months after which time	
>	Order	the petition either file a petition for distribution	
	Aff. Posting	or subsequent status report.	Reviewed by: skc
	Status Rpt	Status Report filed 9/15/15 requested an	Reviewed on: 7/6/16
	UCCJEA	additional six months.	Updates:
	Citation	additional six morning.	Recommendation:
	FTB Notice	Status Report filed 3/9/16 requested an	File 7 - Teixeria
		additional four months.	
		<u>SEE PAGE 2</u>	

Page 2

Status Report filed 9/15/15 states the two beneficiaries of the estate are she and her brother, Anthony Teixeira; however, Anthony Teixeira died on 4/24/15. A probate proceeding has not been commenced, and it is unknown whether he left a will or not. Based on the value of the property that will be distributable to him, a probate proceeding will be necessary. Anthony was survived by three children, one of whom died without issue. The surviving children are both adults, but no one has commenced a proceeding for probate.

Since virtually all of Guadalupe Teixeira's estate consists of real property, an agreement between this Executor and the personal representative of Anthony's estate is necessary to arrive at a plan for partition or allotment of equitable distribution and to avoid undivided interests in accordance with Probate Code §11950. Petitioner has no choice but to await appointment of a personal representative of Anthony's estate, and will inform his daughters that they must commence a proceeding.

Executor had previously informed the court that she believed the majority owners of the Santa Clara property, in which the estate owns a 1/6 interest, were in the process of negotiating a private sale. If such a sale could occur, Executor would be in possession of funds to pay the FTB creditor's claim and close the estate. Executor had also previously informed the court that one of the co-owners was willing to advance funds to cover administrative expenses.

However, Petitioner has recently discovered that she was misled by the co-owners of the Santa Clara property and learned that they are not intending to sell the property or provide cash advance to the estate. Therefore, Petitioner desires to file a partition action against the co-owners and intends to pursue legal remedies, but ultimately may have no choice but to distribute the Santa Clara property interest in kind, in undivided interests between herself and the personal representative of Anthony's estate.

Two of the four creditor's claims have been barred as reported in the prior status reports. The Executor's claim has been withdrawn. The sole remaining claim is the FTB claim for \$19,399.37 plus interest. The estate has hired Katherine B. Alves, CPA to prepare delinquent tax returns and work is expected to be completed this week.

Status Report filed 3/9/16 states she anticipates a personal representative for Anthony's estate will be appointed in April 2016. Re creditor claim: As previously reported, the remaining creditor's claim filed by the Franchise Tax Board amounted to \$19,399.37 plus interest. Executor hired a CPA to prepare delinquent returns and work with the FTB to obtain clearance. The CPA believes withdrawal of the claim by the FTB is imminent. Re the property: As previously reported, Executor intends to pursue legal remedies and is also pursuing sale of the decedent's interest in the Santa Clara property to one of the majority owners. Petitioner has sufficient funds in the estate to cover closing and distribution, so she would be in a position to distribute the real property in kind if a distribution scheme can be worked out with the personal representatives of Anthony's estate once appointed.

8A Ashley Mullin (GUARD/P)

Case No. 13CEPR00950

Petitioner Barnes, Lisa J. (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Successor Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
Co	nt. from 061516 Aff.Sub.Wit. Verified			Note: Page B is the related petition to terminate the existing guardianship with Athena Calomiris.
	Inventory PTC			Minute Order 6/15/16: Examiner notes given.
~	Not.Cred. Notice of			Note: As of 7/6/16, the
_	Hrg Aff.Mail	W		following issue remains noted:
	Aff.Pub.	VV		Need proof of
	Sp.Ntc.			service of Notice of
	Pers.Serv. Conf.			Hearing with a copy
	Screen			of the petition at least 15 days prior
~	Letters			to the hearing per
~	Duties/Supp			Probate Code §1511
	Objections			or consent and waiver of notice or
	Video Receipt			declaration of due diligence on:
~	CI Report			- Brianna Mullin
>	Clearances			(Kaszacs) (Sibling)
~	Order			- Isabella Silveira (Sibling)
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 7/6/16
~	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 8A- Mullin

A8

Petitioner

Barnes, Lisa J. (Pro Per – Maternal Grandmother – Petitioner)

Petition for Termination of Guardianship

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
C0	nt. from 061516		Minute Order 6/15/16: Examiner notes given.
	Aff.Sub.Wit.		Note: Ac of 7///1/ Hos
			Note: As of 7/6/16, the following issue remains
Ě	Verified		noted:
	Inventory		
 	PTC		Need proof of service
	Not.Cred.		of Notice of Hearing
~	Notice of		with a copy of the petition at least 15
	Hrg W		days prior to the
È	Aff.Pub.		hearing per Probate
	Sp.Ntc.		Code §1460(b)(5) <u>or</u>
	Pers.Serv.		consent and waiver of
			notice <u>or</u> declaration
	Conf. Screen		of due diligence on: - Brianna Mullin
	Letters		(Kaszacs) (Sibling)
	Duties/Supp		- Isabella Silveira
	Objections		(Sibling)
 	Video		
	Receipt		
~	CI Report		
	9202		
~	Order	1	
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 7/6/16
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 8B- Mullin

8B

9 Sierra Moreno-Long (CONS/PE)

Attorney: Heather H. Kruthers

First Account Current and Report of Successor Conservator and Petition for Allowance of Compensation to Successor Conservator and Attorney

Allowance of Compensation to Successor Conservator and Attorney			
	PUBLIC GUARDIAN, Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from Aff.Sub.Wit. ✓ Verified	Account period: 1/7/15 – 5/16/16 Accounting - \$170,954.69 Beginning POH - \$170,718.33 Ending POH - \$150,718.02 (\$147,937.02 is cash)	 Petition requests authority to pay court fees totaling \$591.00. Odyssey shows there is an outstanding balance owing of \$569.00. Calculated as follows: \$435.00 filing fee 	
Inventory PTC Not.Cred. ✓ Notice of Hrg ✓ Aff.Mail W/	Conservator - \$6,104.32 (52.25 Deputy hours @ \$96/hr and 14.32 Staff hours @ \$76/hr) Attorney - \$2,500.00 (per	general petition; • \$60.00 filing fee temporary petition; • \$52.00 certified copies; • \$22.00 remaining balance owed for court investigation fee	
Aff.Pub. Sp.Ntc. Pers.Serv.	Local Rule) Bond fee - \$501.60 (o.k.)	(\$547.00 assessed on 2/6/15, \$525.00 paid on 8/24/15) Note: Examiner has	
Conf. Screen	Court fees - \$591.00 (filing fee, process fees)	interlineated the order.	
Letters Duties/Supp Objections	Petitioner prays for an Order:	Note: If the petition is granted, a status hearings will be set as follows:	
Video Receipt CI Report 9202	 4. Approving, allowing and settling the first account; 5. Authorizing the conservator and attorney fees and commissions; 6. Payment of the bond fee; 	Wednesday, July 18, 2018 at 9:00 a.m. in Department 303, for the filing of the second account.	
✓ Order	7. Payment of court fees.	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.	
Aff. Posting		Reviewed by: KT	
Status Rpt		Reviewed on: 7/6/16	
UCCJEA		Updates:	
Citation		Recommendation:	
FTB Notice		File 9- Moreno-Long	
		9	

10 Richard Campbell Jr. (GUARD/P)

Case No. 14CEPR00977

Petitioner Ja-Hadrha Johnson (Pro Per, mother)

Guardian Willie Mae Johnson (Pro Per, maternal aunt)

Petition for Termination of Guardianship

			IA HADRHA IOHNSON mother is	NEEDS/PROBLEMS/COMMENTS:
			JA-HADRHA JOHNSON , mother, is Petitioner.	
			Tellioner.	Note for background: Petitioner's
				previous Petition for Termination was
			~Please see petition for details~	heard on 2/18/2016. At the hearing
Со	nt. from		,	on 2/18/2016, the petition was denied; the Minute Order states:
	Aff.Sub.Wit.			Willie Mae Johnson was admonished
✓	Verified			by the Court. She cannot violate nor
	Inventory			ignore a Court order or she will be in
	PTC			danger of being removed and the matter referred to foster care.
	Not.Cred.			Unsupervised visits with mother are
✓	Notice of Hrg			every other week starting at 5pm Friday and ending Sunday at 5pm,
√	Aff.Mail	W/		starting this Saturday 2/26/2016.
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report	Χ		
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 7/6/16
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 10- Campbell

Attorney: Nancy J. LeVan (for Petitioner Kaysia Barr and Keith Barr)

Petition for Withdrawal of Funds from Blocked Account

			KAYSIA BARR, maternal grandmother,	NEEDS/PROBLEMS/COMMENTS:
			and KEITH BARR, maternal uncle, co-	
			guardians of the estate, are	Continued from 5/19/16. As of 7/6/16 no additional documents have been
			petitioners.	filed.
	nt. from 030216,		Petitioners state the minor lives with	mod.
040	616, 051116		Kaysia Barr and David Barr, co-	1. Petition requests \$2,720.00 for
	Aff.Sub.Wit.		guardians of the person. Their total	payment to the Orthodontist.
✓	Verified		monthly income from Social Security is \$1,743 per month. They receive	Petition for withdrawal of fees from blocked account on page 11B
	Inventory		\$457.00 a month in Social Security	requests authority to reimburse
	PTC		Death Benefit for Allison. Kaysia Barr	Petitioner \$320.00 for reimbursement
	Not.Cred.		and David Barr have paid for all of the	for payments that appear to have
1	Notice of		expenses of the guardianship from	been made after the filing of this
	Hrg		their personal funds.	petition. Therefore it appears that the payment to the orthodontist
✓	Aff.Mail	W/	Petitioners state they agree to pay	should be \$2,400.00 and not
	Aff.Pub.		Kaysia Barr and David Barr	\$2,750.00 as requested.
	Sp.Ntc.		reimbursement of \$2,467.00 for medical expenses not covered by	
	Pers.Serv.		insurance, ½ of the court ordered	
	Conf. Screen		therapy in the amount of \$637.50 and	
	Letters		a total of \$1,444.33 for court fees. In	
	Duties/Supp		addition, petitioners request payment	
	Objections		to Kubo Orthodontics \$2,720.00 for the balance due for the minor's braces.	
	Video		balance abe for the million's braces.	
	Receipt			
	CI Report		Balance in the blocked account	
	9202		totals \$65,731.13.	
✓	Order		Dalilianassa akada Haa kakada assa assa k	
	Aff. Posting		Petitioners state the total amount requested for reimbursement is	Reviewed by: KT
	Status Rpt		\$7,268.83.	Reviewed on: 7/6/16
	UCCJEA		4.7	Updates:
	Citation			Recommendation:
	FTB Notice			File 11A- Holt
				11A

Attorney: Nancy J. LeVan (for Petitioner Kaysia Barr and Keith Barr)

Petition for Withdrawal of Funds from Blocked Account

(F-					
Со	ont. from 051116				
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
	Notice of				
	Hrg				
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf.				
	Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
	9202				
1	Order				
*					
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				
<u> </u>	110 HORCE				

KAYSIA BARR, maternal grandmother, and **KEITH BARR**, maternal uncle, coguardians of the estate, are petitioners.

Petitioners request authority to withdraw funds from the blocked account as follows:

- \$931.59 for payment for preparation of taxes (\$175.00), filing fees (\$60.00), furniture for the minor (mattress topper, cover, pillow and end of bed chest with storage \$376.59) and orthodontics payment (\$320.00).
- \$167.00 to the Internal Revenue Service for payment of federal taxes.
- \$358.00 to Franchise Tax Board for payment of state taxes.

Balance in the blocked account totals \$65,731.13.

Petitioners state the total amount requested for reimbursement is \$1,456.59

NEEDS/PROBLEMS/COMMENTS:

Continued from 5/19/16.

- 1. Petition requests \$320.00 for reimbursement for the Orthodontist. Petition for withdrawal of fees from blocked account on page 11A requests authority to pay off the balance due on the orthodontist. The \$320.00 appears have been paid after the request on page 11A. Therefore the request on page 11A should be reduced by \$320.00.
- 2. Petitioner requests reimbursement for a mattress topper, cover and pillow in the sum of \$312.74. The receipt from Costco shows one of the items listed is for a Nutri Ninja Blender (\$119.99) and not a mattress cover. – **Declaration of Co-Guardian Kaysia Barr states** she mistakenly thought the \$119.99 was part of the \$312.74 for the jumbo pillow and queen topper for Allison's bed. This amount was actually for a Nutri Ninja Auto iQ Complete Extraction System that Allison wanted. Allison uses this every day for fruit blended drinks, slushies and milk shakes. If the Court believes that this is an expense that should not be reimbursed, then please reduce the reimbursement by \$129.86

Reviewed by: KT

Reviewed on: 7/6/16

Updates: 7/7/16

Recommendation:
File 11B- Holt

(\$119.99 plus tax).

Attorney

De Goede, Dale A. (for Executor Alene Y. Soley)

Status RE: Filing of the First or Final Account

DOD: 12/17/14	ALENE Y. SOLEY, Spouse, was appointed	NEEDS/PROBLEMS/COMMENTS:
205.12,17,17	Executor with Full IAEA without bond on	
	4/15/15.	1. Need first account or
	=	petition for final distribution
	At the hearing on 4/15/15, the Court set this	pursuant to Probate Code
Cont. from	status hearing for the filing of the first or final	§12200.
Aff.Sub.Wit.	account.	
Verified]	
Inventory	Status Report filed 7/5/16 states the estate is	
PTC	not in a condition to be closed. A Timber	
Not.Cred.	Harvesting Plan (THP) has been approved by the California Dept. of Forestry and Fire	
Notice of	Protection (Cal Fire) which will allow the	
Hrg	harvesting of timber on the estate real	
Aff.Mail	property in Alta, CA. The executor has	
Aff.Pub.	determined that it is in the best interest of the	
Sp.Ntc.	estate to contract with a different Licensed	
Pers.Serv.	Timber Operator (LTO) and a different Registered Professional Forester (RPF) than	
Conf.	those named in the THP and has entered into	
Screen	negotiations with the plan submitter, Brian	
Letters	Forkner, the LTO, and the plan's registered	
Duties/Supp	forester, David E. Levy, RPF, to have them	
Objections	release any interest they have in the THP or	
Video	the standing timber on the real property. A	
Receipt	settlement has been agreed to in principle, but all parties have not yet executed the	
CI Report	agreement. The settlement will also entail	
9202	having the THP with Cal Fire amended.	
Order		
Aff. Posting	Also, the estate has submitted claims with	Reviewed by: skc
Status Rpt	the State Controller's office for unclaimed	Reviewed on: 7/6/16
UCCJEA	property in the name of the decedent, which have not yet been collected and will	Updates:
Citation	require supplemental inventory and	Recommendation:
FTB Notice	appraisal.	File 12- Soley
	It is anticipated that the estate can secure	
	the amendment of the THP and collect the	
	claims within the next three months;	
	therefore, Executor requests continuance.	
	Notice of the status hearing and report was	
	mailed to interested parties on 7/5/16.	
	Thailed to inforcated parties of 7/3/10.	

Attorney

Samuel Her (GUARD/P)

Hopper, Cindy J. (for Abel Wrate and Yer Wrate – Guardians)

Probate Status Hearing RE: Transfer to Oregon

uncle and aunt, were appointed Co-Guardians on 08/26/15. Minute Order of 03/02/2016: C	
reports that the Oregon Attorned	ey
Both Petitioners and the minor reside in advised her that Oregon requi	-
Cont. from 120215, the State of Oregon. order before the case can be transferred, thus she filed the n	
Aff.Sub.Wit. Minute Order from 08/26/15 set this transferred, thus she filed the p	eillion
Verified status hearing and states: The Petition is	
Inventory granted with the condition that the	
matter is to be transferred to Oregon. 1. Need status update regard	_
Not.Cred. Order Fixing Residence Outside the establishing a guardianship State of Oregon.	ווווטוווט
Notice of State of California was granted on	
Hrg 03/02/2016 allowing the Petitioners to	
Aff.Mail move to the State of Oregon.	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video Receipt	
CI Report	
9202	
Order	
Aff. Posting Reviewed by: LV	
Status Rpt Reviewed on: 07/07/2016	
UCCJEA Updates:	
Citation Recommendation:	
FIB Notice File 13 - Her	
12	

14 Quinn Jackson, Kelsey Jackson (GUARD/P) Attorney Rozzo, Heather (for Petitioner Judith Jackson)

Case No. 15CEPR00764

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
>	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail			1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice or declaration of due diligence on: - Kelsey's paternal grandparents
F	Aff.Pub.	W		- Maternal Grandfather
	Sp.Ntc.			Bobby Gene Jackson
	Pers.Serv.			
~	Conf. Screen			
~	Letters			
~	Duties/Supp			
	Objections			
	Video Receipt			
>	CI Report			
~	Clearances			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 7/6/16
~	UCCJEA			Updates:
 	Citation			Recommendation:
	FTB Notice			File 14- Jackson

Attorney Attorney Heather H. Kruthers (for Petitioner Public Guardian)
Deborah K. Boyett (Court-appointed for Conservatee)

Attorney Jeffrey A. Jaech (for Diane Varao, daughter)

Petition for Court's Confirmation of Conservatee's Current Placement

	DUDUC CHARDIAN Composition of the First	NIFFDC /DDODLFAAC /COAAAAFNITC:
	PUBLIC GUARDIAN , Conservator of the Estate appointed on 10/1/2015 and Conservator of	NEEDS/PROBLEMS/COMMENTS:
	the Person appointed on 11/122015, is	Note: Minute Order dated
	Petitioner.	11/12/2015 from the hearing on
	i omionor.	the petition for appointment of
Cont. from	~Please see Petition for details~	conservator states, in pertinent
Aff.Sub.Wit.		part: The Court finds substantial
✓ Verified		disharmony and disagreement
I Inventory		in the family with regard to the care of Maria Madrigal and
Inventory		appoints the Public Guardian
PTC		as Conservator of the Person.
Not.Cred.		Letters are to issue forthwith
✓ Notice of		from the minute order. The
Hrg		Court orders that Maria
✓ Aff.Mail W/		Madrigal is to remain at Anita
Aff.Pub.		Juarez's home and not be
Sp.Ntc.		placed into a facility without a properly noticed hearing and
Pers.Serv.		Court approval.
Conf.		Coon approvan
Screen		
Letters		
Duties/Supp		
Objections		
Video	1	
Receipt		
✓ CI Report	1	
9202		
	4	
√ Order		
Aff. Posting		Reviewed by: LEG
Status Rpt		Reviewed on: 7/7/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 15- Madrigal

16 James Dulany Sample (CONS/PE)

Attorney: Gary G. Bagdasarian (for Conservator Alice Sample)

Case No. 15CEPR01081

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	ALICE SAMPLE was appointed	NEEDS/PROBLEMS/COMMENTS:
	Conservator of the person and	
	estate with bond set at \$39,000.00	
	on 12/16/15.	1. Need inventory and
Cont. from 042016		appraisal or current
Aff.Sub.Wit.	The Order was amended on 2/17/16	written status report
Verified	ordering bond to be set at \$48,400.00.	pursuant to Local Rule 7.5
Inventory	\$ \$40,400.00.	which states in all matters
PTC	Bond of \$48,400.00 was filed on	set for status hearing
Not.Cred.	2/29/16.	verified status reports must
Notice of		be filed no later than 10
Hrg	Letters issued on 3/2/16.	days before the hearing.
Aff.Mail		Status Reports must
Aff.Pub.	Minute order dated 12/16/15 set a	comply with the
Sp.Ntc.	status hearing for the filing of the	applicable code
Pers.Serv.	inventory and appraisal.	
Conf.		requirements. Notice of
Screen		the status hearing,
Letters		together with a copy of
Duties/Supp		the Status Report shall be
Objections		served on all necessary
Video		parties.
Receipt		
CI Report		
9202	1	
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 7/6/16
UCCJEA		Updates:
Citation	1	Recommendation:
FTB Notice		File 16- Sample

Attorney: Mark S. Poochigian (for Susan Tanya Hodge)

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 6/14/14	SUSAN TANYA HODGE was	NEEDS/PROBLEMS/COMMENTS:
	appointed Executor, with full IAEA	
	authority and without bond, on	
	12/16/15.	OFF CALENDAR. Continued to
Cont. from 051716	Letters issued 12/21/16.	9/14/16 per Order Granting
Aff.Sub.Wit.	Letters issued 12/21/16.	Application for Continuance of Status
Verified	Minute order dated 12/16/15 set this	Hearing signed on 7/7/16.
Inventory	status hearing for the filing of the	1. Need inventory and
PTC	inventory and appraisal.	appraisal.
Not.Cred.		арргават.
Notice of	1	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 7/7/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 17- Soojian

18 George Thomas Chisum (CONS/PE) Case No. 15CEPR01205

Attorney Kruthers, Heather H (for Public Guardian)

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	PUBLIC GUARDIAN, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Conservator of the Estate, by Minute	
	Order dated 03/16/2016.	
	_	1. Need Inventory and Appraisal or
	Letters issued on 04/19/2016.	current written status report
Cont. from		pursuant to Local Rule 7.5 which
Aff.Sub.Wit.	Minute Order of 03/16/2016 set this	states in all matters set for status
Verified	Status Hearing for the filing of the	hearing verified status reports
Inventory	Inventory and Appraisal. Minute Order states: The Court appoints	must be filed no later than 10
PTC	the Public Guardian as to the estate	days before the hearing. Status
Not.Cred.	only; Letters are to issue forthwith from	Reports must comply with the
Notice of	the minute order. The status hearings	applicable code requirements.
Hrg	listed below were not stated in open	Notice of the status hearing,
Aff.Mail	court, and the hearings are for the	together with a copy of the Status
Aff.Pub.	Public Guardian's filings with regard to	Report shall be served on all
Sp.Ntc.	the conservatorship of the estate only. No appearance is necessary at the	necessary parties.
Pers.Serv.	status hearings is the required	, , , , , , , , , , , , , , , , , , , ,
Conf.	documents are filed at least two court	
Screen	days prior.	
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 07/07/2016
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 18- Chisum
		18

Norma Elaine Lawson (Estate) 19

Case No. 16CEPR00220

Attorney Butler, R Frank (for Daniel I.S.J. Rey-Bear – Administrator)

Probate Status Hearing Re: Filing Proof of Funds in Blocked Account

DC	D: 02/09/2016	DANIEL I.S.J. REY-BEAR, was appointed	NEEDS/PROBLEMS/COMMENTS:
		Administrator with limited IAEA	
		authority, with \$1,377,528.40 (approx.)	Need Receipts for Blocked
		ordered to be placed into blocked	Accounts.
CC	ont. from	accounts at Chase Bank and Wells	
	Aff.Sub.Wit.	Fargo Bank, and with bond set at \$20,000.00 on 06/22/2016.	
	Verified	φ25/555155 511 55/ <u>22/</u> 25 1 5.	
	Inventory	Order to Deposit Money into Blocked	
	PTC	Account filed 05/18/2016 indicates total	
	Not.Cred.	amount to be deposited is in Chase	
-	Notice of	Bank is \$1,106,502.08.	
	Hrg	Order to Deposit Money into Blocked	
	Aff.Mail	Account filed 05/18/2016 indicates total	
	Aff.Pub.	amount to be deposited is in Wells	
	Sp.Ntc.	Fargo Bank \$291,026.12.	
	Pers.Serv.	Receipt of Bond filed 07/06/2016 in the	
	Conf.	amount of \$20,000.00.	
	Screen		
	Letters	Letters issued on 07/06/2016	
	Duties/Supp	Minute Order of 06/22/2016 set this	
	Objections	Status Hearing for the filing of the Proof	
	Video	of Funds in Blocked Account.	
	Receipt		
<u> </u>	CI Report		
	9202	4	
	Order	-	
	Aff. Posting	-	Reviewed by: LV
	Status Rpt	-	Reviewed on: 07/07/2016
	UCCJEA	-	Updates:
	Citation		Recommendation:
	FTB Notice		File 19- Lawson

Petitioner Daniels, Melissa (Pro Per – Maternal Great-Aunt)

Petition for Appointment of Guardian of the Person

			TEMPORARY EXPIRES 07/13/2016	NEEDS/PROBLEMS/COMMENTS:
			MELISSA DANIELS , Maternal Great-Aunt, is Petitioner.	Minute Order of 06/08/2016: Examiner notes provided in open court. The Court grants permission
Co	nt. from 060816	1	Please see petition for details	for Facebook or text notice that
	Aff.Sub.Wit.			includes all pertinent information;
✓	Verified			proof of any said message must be brought to Court.
	Inventory			Need proof of service fifteen
	PTC			(15) days prior to the hearing of
	Not.Cred.			the Notice of Hearing along
1	Notice of Hrg	Х		with a copy of the Petition for
1	Aff.Mail	w/		Appointment of Guardian or consent and waiver of notice
		**/		for:
—	Aff.Pub.			 Jose Pablo Gomez, Sr.
—	Sp.Ntc.			(Paternal Grandfather)-
	Pers.Serv.	n/a		Unless the Court
✓	Conf. Screen			dispenses with notice. Note: Declaration of Due Diligence
1	Letters			filed 06/10/2016 includes a
√	Duties/Supp			declaration from Jose Pablo Gomez, father, which states he
	Objections			grew up on Foster Care as a child
	Video			and his father, Jose Pablo Gomez,
	Receipt			Sr. was never in his life.
√	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 06/06/2016
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 20- Estrada
				20